

# Metfriendly Lifetime ISA Transfer Application Form



You will also need to complete a Metfriendly Lifetime ISA application form unless you have already done so.

**Minimum transfer limit - £1200 unless you are also paying premiums into a Metfriendly Lifetime ISA.**

Mr/Mrs/Ms/Miss	Surname	Forename(s)
First line of home address		Postcode
Date of Birth	Gender M <input type="checkbox"/> F <input type="checkbox"/>	National Insurance Number

You should be able to find your NI number on a payslip, Form P45 or P60 or a letter from HM Revenue & Customs, a letter from the DWP, or pension order book.

Email Address	Preferred Contact No
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We would like to email you from time to time with relevant information on financial issues relating to the police, such as police pay, and products and services we provide including special offers. If you would like to receive the above information **please indicate your consent by ticking the box to the left.** You will be able to unsubscribe from these communications easily and at any time.

If applying as a relative of a serving or retired member of the police service, please complete:

Name of serving or retired member	Your relationship
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The following details should be given for the applicant or the applicant's partner or relative as applicable

Constabulary	Prefix & Warrant/Payroll No
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For your own benefit and protection, you should read the Key Information Document associated with this product, available by request or viewable at [metfriendly.org.uk](http://metfriendly.org.uk). A copy will also be posted to you once your policy is set up.

I apply to transfer my existing ISA a/c no

In whole  All except current tax year  In part  **Estimated value of ISA transfer** £

**Is this a Help to Buy ISA?** Yes  No

<b>From</b> (existing manager) Name: Address:	<b>To</b> Metfriendly Central Court, Knoll Rise, Orpington, BR6 0JA Tel: 01689 891454
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Where a period of notice is required for closure/part transfer of the existing ISA I give my consent to either: (please tick as appropriate)

1. Serve the full notice period before this instruction can be processed; or
2. Proceed immediately with the transfer and bear the consequential penalty that may be applied.

If you want to pay other monthly or lump sum contributions, you will need to send us the appropriate application.

## Proof of ID

Unless you have already done so, please provide proof of identity (e.g. a copy of a passport, driving licence or birth certificate). We also need proof of address (e.g. a copy of an original bank statement or utility bill dated within the last three months, please note online statements are not acceptable). A driving licence is an acceptable proof of address if not also being used to prove identity. You should sign the back of each copy to confirm it is a true copy of the original. If you have any questions regarding these requirements, please call or e-mail us.

## ISA Declaration & Authorisation

### I declare that:

- I am 18 years of age or over; **and**
- I have not subscribed/make a payment to and will not subscribe/make a payment more than the overall subscription limit in total to any combination of permitted ISA types in the same tax year.

### I authorise Metfriendly

- To hold my cash subscription, any other proceeds in respect of my ISA investments and any other cash; **and**
- To make on my behalf any claims to relief from tax in respect of ISA investments; **and**
- to submit lifetime ISA bonus claims to HMRC on my behalf; **and**
- to withhold and deduct from a balance in the lifetime ISA and to pay to HMRC any charges due on withdrawals, **and**
- to make a record in writing in accordance with Regulation 12B paragraph 7(a) of the Individual Savings Account Regulations where required to do so; **and**
- To contact my existing ISA manager to arrange this transfer.

### I authorise my existing ISA Manager

- To transfer the ISA to Metfriendly; **and**
- To provide Metfriendly with any information, written or non-written, concerning the existing ISA; **and**
- To accept any instructions from Metfriendly relating to the ISA being transferred.

### Declaration

- I hereby apply for the Metfriendly product named at the beginning of this Application document and accept the terms and conditions as described within the product literature and elsewhere within this Application document.
- I apply for membership of Metfriendly in accordance with the provisions of its Rules (unless I am already a Member) and I agree to abide by Metfriendly's Rules at all times (a copy of Metfriendly's Rules appears on its website and is available in printed form upon request to the Secretary at the Registered Office).

Signed <b>APPLICANT</b>	Date	Promotional Code
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**OUR DATA PRIVACY STATEMENT** We need the information you provide in order to set up the contract between you and us. We will share your data with our mailing house partners (see our privacy notice) to send you legally required documents such as your annual benefit statement and invitation to our Annual General Meeting. Your data will only be kept for such a time needed to perform this task. Where possible we use external information to verify your identity and to keep our records up to date on home address changes. We use a third party provider to deliver our marketing emails. We gather statistics around email opening and clicks using industry standard technologies. For more information, please see our privacy notice at [metfriendly.org.uk/privacy](http://metfriendly.org.uk/privacy)

### How did you hear about Metfriendly?

I am a member  Newsletter  I received a letter  Brochure stand  Intranet  Received an email   
Personal recommendation  Internet search  Twitter  Facebook  I spoke to a Metfriendly representative   
I saw an advert - please state which publication  Other - please state

Publication/Other

### Contact Details

Metfriendly, Central Court, Knoll Rise, Orpington, BR6 0JA  
Phone: 01689 891454 Fax: 01689 891455 Metphone: 846690 Email: [info@metfriendly.org.uk](mailto:info@metfriendly.org.uk)

**Metfriendly is a trading name of the Metropolitan Police Friendly Society Limited.**

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